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# **The Netherlands**

## **Tobacco and Products**

### **Annual**

### **2001**

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#### **Report Highlights:**

**The Dutch cigarette industry is the largest in Europe. In 2000, total Dutch cigarette production increased 2.5 percent. More than 97 percent of Dutch cigarette production is exported to the European Union, mostly to France and Italy. The U.S. remained the most important supplier of flue cured and burley tobacco to Dutch tobacco products producers.**

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Includes PSD changes: Yes  
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## Executive Summary

In 2000, total Dutch cigarette production increased 2.5 percent. More than 97 percent of Dutch cigarette production is exported to the European Union, mostly to France and Italy. Although the number of Dutch smokers decreased by 1 percent, cigarette sales increased slightly, by 0.8 percent in volume. On a value basis, however, sales increased by 4.7 percent, due to increased prices and a higher excise tax (which is included in the retail price).

Total Dutch imports of raw tobacco (flue cured, burley, dark air & sun cured, and oriental) totaled 79,993 metric tons in 2000, down 5.7 percent from the previous year. The U.S. market share as a percentage of total imports increased from 32.3 percent in 1999 to 37.0 percent in 2000. In 2000, the United States remained the largest single supplier of flue-cured tobacco to the Netherlands with a 40.3 percent market share, up from 35.5 percent in 1999. Due to its unstable political situation, Zimbabwe, the second largest supplier in 1999, decreased its market share from 21.6 percent in 1999 to 8.2 percent in 2000. As a result, Brazil saw its market share increase from 14.1 percent in 1999 to 23.6 percent in 2000 and became the second largest supplier of flue-cured tobacco. Brazil also increased its share of the burley tobacco market from 7.6 percent in 1999 to 11.8 percent in 2000. The United States remained the largest supplier of burley tobacco to the Netherlands with a 54.6 percent market share, up from 52 percent in 1999.

Total Dutch exports of raw tobacco (flue cured, burley, dark air & sun cured, and oriental) dropped to 11,121 metric tons in 2000, down 10.3 percent compared to the previous year. With a volume of 10,996 metric tons, exports of flue cured tobacco were by far the most important. Belgium and Greece are the main export destinations for Dutch raw tobacco.

Exchange Rate			
Year	U.S. \$	EURO	Dutch florin (guilder)
1999	1	0.94	2.07
2000	1	1.09	2.39
2001	1	1.14	2.45

Note: For 2001 exchange rates are only available for the first six months

*NOTE: due to the elimination of EU intra-border controls, intra-EU trade statistics are no longer gathered through customs declarations. The Dutch Central Bureau of Statistics (CBS) now depends on direct reports from importers and exporters on intra-EU movement of goods. Companies with a relative small trade volume have been exempted from this trade reporting requirement. In addition, the response of importers and exporters has been limited and uneven, so intra-EU trade statistics are incomplete. Therefore, figures used are based primarily upon available trade statistics, speculations and assumptions made by the trade and Office of AgAffairs estimates.*

## Production

### Cigarettes

Total Dutch cigarette production increased 2.5 percent from 119,983 million pieces in 1999 to 123,071 million in 2000. The two largest cigarette manufacturers in the Netherlands are BAT Manufacturing (The Netherlands) B.V. and Philip Morris Holland B.V.

The four major Dutch cigarette manufacturers are:

**B.A.T. Manufacturing Nederland b.v.**

Kerkstraat 27  
6901 AA Zevenaar  
Tel. 31-316-590911

**J.T. International Company Nederland b.v.**

Vreelandseweg 46  
1216 CH Hilversum  
Tel. 31-35-622.28.88

**Philip Morris**

Groenelaan 5  
1186 AA Amstelveen  
Tel. 31-20-6564100

**Reemtsma Nederland b.v.**

Comeniuslaan 10  
1412 GP Naarden  
Tel. 31-35-694.97.66

As the Dutch tobacco industry has an extensive production of cigar and cut tobacco (roll-your-own, pipe- and chewing tobacco) production, a brief overview of these products follows.

### Cigars

With a total production of more than two million cigars, senioritas and cigarillos each year, Holland is the second largest cigar manufacturer in the world after the United States. A substantial part of Dutch cigars are produced by affiliates located just across the Belgium border, in Ireland and even Sri Lanka. In most cases, semi-manufactured cigars are made in the "foreign" affiliates, subsequently "exported" to the Netherlands and finished in this country. The Dutch Central Bureau of Statistics considers both cigars that have been entirely produced in the Netherlands and those semi-processed at a foreign affiliate as domestic production.

Dutch cigars and cigarillos are exported to more than 100 countries. The leading export destinations are France, Belgium and Luxembourg (BLEU), the United Kingdom, and Germany.

### Smoking and Cut Tobacco

The Netherlands is by far the largest producer of roll-your-own tobacco in Europe although it is also produced in other European countries such as the U.K., Germany, Norway, Denmark and France. Production of cut tobacco (roll-your-own, pipe- and chewing tobacco) increased 6.5 percent in 2000 to 30.7 million kilos. Imperial Tobacco Nederland R.Y.O. B.V., Koninklijke Theodorus Niemeyer B.V., Tabaksfabriek Heupink & Reinders B.V., Tabakskerverij J.B.G. Bloemen B.V. and Biggelaar Tabak B.V. account for the total production of the cut tobacco products.

The Dutch roll-your-own tobacco industry is working very hard to develop export markets as they believe it is the only possibility to expand production. Germany and Belgium are already important customers of the Dutch roll-your-own tobacco industry, whereas the French market is slowly developing an interest. The competitiveness and strength of the Dutch roll-your-own tobacco industry have direct bearings on the importation of U.S. dark fire cured tobacco, which is

a required ingredient for this product.

The four producers of roll-your-own and pipe tobacco in the Netherlands are:

**Tabakskerverij J.B.G. Bloemen B.V.**

De Mors 120  
7631 AK Ootmarsum  
Tel. 31-541-291218

**Tabaksfabriek Heupink & Reinders b.v.**

De Mors 84  
7631 AK Ootmarsum  
Tel. 31-541-291285

**Imperial Tobacco Nederland/Van Nelle Tabak  
Nederland**

Tabaksmaatschappij B.V.  
Van Nelleweg 1  
Tel. 31-10-4464444

**Koninklijke Theodorus Niemeyer b.v.**

Theodurus Niemeyerstraat 1  
9726 BB Groningen  
Tel. 31-50-3664911

## Macro-economic Importance of the Tobacco Industry in The Netherlands

The tobacco industry contributes to the Dutch economy in terms of employment, tax yield and trade. More than 4,500 people are employed in the Dutch tobacco industry. Indirectly, 23,000 work in distribution, wholesale, retail and advertising. The tobacco industry in the 15 member states of the EU employed an equivalent of 1 percent of total employment in the EU. Tobacco companies have a remarkably long “lifetime”, averaging 156 years. The regular lifetime of a company in the Netherlands is 12.5 years. The Dutch Government receives yearly almost two billion U.S. dollars from taxes and excise taxes.

Given that more than half of the official selling price of cigarettes in the EU consists of excise duties, fraud in the industry is a growing problem. The illegal importation of cigarettes results in large income losses for the government and huge profits for smugglers. The European Anti-Fraud Office (OLAF) estimates that “black” cigarettes account for up to 10 percent of the EU market - worth US \$4.1 billion in tax revenues. In 1999, 66 million illegally imported cigarettes - worth US \$2.9 million in tax revenues - were intercepted in the port of Rotterdam. In August 2001, the European Commission filed a new complaint against Philip Morris Co. and R.J. Reynolds Tobacco Holdings Inc. for cigarette smuggling, even though a U.S. judge dismissed a similar case in July 2001. The original suit alleged that both U.S. tobacco companies and several affiliates conspired with distributors, shippers, smugglers, drug deals and currency brokers to illegally bring their cigarettes into European Union countries starting in the late 1970s. The European Commission filed the new case along with the Netherlands, Italy, Germany, France, Spain, Portugal, Greece, Belgium, Finland and Luxembourg.

## Consumption

In the Netherlands, one third of women (31.2 percent) and 40.9 percent of men smoke, according to the Dutch Social and Cultural Plan Bureau. In Europe, only Danish women (36 percent) and Spanish men (43 percent) smoke more than the Dutch. According to Euromonitor International, the annual Dutch per capita consumption of cigarettes was 1,047 cigarettes in 1999. In general, the higher the educational level, the less people smoke.

Since 1991, twice as many men have stopped smoking (8 percent) than women (4 percent). According to the Social and Cultural Plan Bureau, this is due to the emancipation of women. Although the number of smokers decreased by 1

percent to 35.9 percent in 2000, cigarette sales increased slightly, by 0.8 percent. In pieces, sales increased from 16,543 billion in 1999 to 16,679 in 2000. On a value basis, there was an increase of 4.7 percent over the preceding year, due to increased prices and a higher excise tax.

Recent research has shown that people start smoking at a younger age in the Netherlands. It is no longer exceptional for children as young as ten to smoke cigarettes. About 8 percent of 12-year olds, like 40 percent of 15-year olds and 52 percent of 18-year olds frequently smoke. Studies have shown that the younger people start smoking, the harder it is to quit. It is also clear that parents who smoke influence their children to smoke. Although in the Netherlands 100,000 people stop smoking each year, 90,000 others take their first cigarette. More than 85 percent of first time users are under the age of 18. Approximately 50 percent of people who start smoking in the 12-18 year old category will die of smoking-related diseases.

The Dutch Cigarette Manufacturers Association published the following figures on smoking habits of Dutch people in 18-65 year old category. This category includes about 12 million men and women. In 1999, approximately 4.4 million persons (36.4 percent of the adult population) smoked 20 cigarettes a day on average.

Smoking Demographics				
	1997	1998	1999	2000
Non-smoker	63.4%	62.9%	63.6%	64.1%
Smokers	36.6%	37.1%	36.4%	35.9%
<u>Smokers:</u>				
- Cigarettes	34.7%	36.3%	38.4%	39.5%
- Roll-your-own	23.9%	23.9%	22.6%	22.1%
- Cigarettes and r-y-o	32.8%	31.2%	28.6%	28.3%
- Other	8.6%	9.6%	10.4%	10.1%
- Men:	53.2%	53.5%	53.4%	50.7%
- Women:	46.8%	46.5%	46.6%	49.3%

Source: Association of the Cigarette Industry, 2001

<b>The Most Popular Cigarette Brands by Sales:</b>				
	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>
1. Marlboro	21.4%	21.9%	22.7%	22.9%
2. Marlboro lights	7.7%	8.5%	9.9%	10.7%
3. Camel filter	8.3%	8.4%	7.8%	7.7%
4. Barclay	5.9%	6.0%	5.8%	5.6%
5. Caballero filter	5.5%	5.7%	5.8%	5.6%
6. Peter Stuyvesant	5.6%	5.3%	5.0%	4.8%
7. Caballero plain	4.6%	4.2%	3.8%	3.3%
8. Pall Mall Export filter	3.4%	3.3%	3.2%	2.9%
9. Camel Lights	-	2.2%	2.1%	2.4%
10. Marlboro Medium	-		2.2%	2.4%

Source: Association of the Cigarette Industry, 2001

## Trade

The Netherlands exported 119.7 billion pieces of cigarettes in 2000, an increase of 1.5 percent compared to 1999. By value, exports dropped 14 percent to US \$1,905 billion in 2000 but the Netherlands remained the largest exporter of cigarettes in Europe. More than 97 percent (a decrease of 1 percent compared to 1999) of total production was exported to EU countries, of which Italy and France are the most important.

<b>Year</b>	<b>Total Exports (million pieces)</b>	<b>Percentage of Domestic Production</b>
1995	92,914	88.4
1996	103,473	92.0
1997	115,215	90.0
1998	110,527	99.0
1999	117,884	98.0
2000	119,710	97.0

Source: Source: Association of the Cigarette Industry, 2001

Note: these figures are different from the figures from CBS, which are used in the PS&D tables

Total Dutch exports of raw tobacco (flue cured, burley, dark air & sun cured, and oriental) were 11,121 metric tons in 2000, a decrease of 10.3 percent compared to the previous year. With a volume of 10,996 metric tons, exports of flue cured tobacco were by far the most important. The Belgian market share as a percentage of total exports decreased from 43.6 percent in 1999 to 34.9 percent in 2000. In the same period, the market share of Greece increased from 29.7 percent to 33.3 percent. Greece remained the largest importer of flue cured tobacco with a 33.7 percent share of the market, down from 42.9 percent in 1999.

### Factors Affecting U.S. Trade

U.S. tobacco remains the preferred tobacco for Dutch tobacco product manufacturers, especially if the prices for U.S. tobacco can compete with the prices for tobacco from Brazil and Zimbabwe. The U.S. flue-cured tobacco is used for flavor. Burley tobacco is considered almost indispensable for making the roll-your-own or shag tobacco which is very popular in the Netherlands. This is particularly true in times when the economy is in a recession and people buy cheaper roll-your-own tobacco instead of cigarettes.

Total Dutch imports of raw tobacco (flue cured, burley, dark air & sun cured, and oriental) totaled 79,993 metric tons in 2000, 5.7 percent less than the previous year. The U.S. market share as a percentage of total imports increased from 32.3 percent in 1999 to 37.0 percent in 2000. This is due to lower imports of flue-cured tobacco and burley tobacco from African countries, like Zimbabwe, Tanzania and Malawi. In 2000, the United States remained the largest single supplier of flue-cured tobacco to the Netherlands with a 40.3 percent share of the market, up from 35.5 percent in 1999. Due to its unstable political situation, Zimbabwe's market share decreased from 21.6 percent in 1999, to 8.2 percent in 2000. As a result, Brazil increased its market share from 14.1 percent in 1999 to 23.6 percent in 2000 and has become the second largest supplier of flue-cured tobacco after the United States. Brazil also increased its share of the burley tobacco market from 7.6 percent in 1999 to 11.8 percent in 2000. The United States remained the largest supplier of burley tobacco to the Netherlands with a 54.6 percent market share, up from 52 percent in 1999.

<b>Imports &amp; Exports of Total Unmanufactured Tobacco</b> (Metric Tons/Values in 1,000 Guilders)						
	<b>1998</b>		<b>1999</b>		<b>2000</b>	
<b>Imports</b>	<b>VOLUME</b>	<b>VALUE</b>	<b>VOLUME</b>	<b>VALUE</b>	<b>VOLUME</b>	<b>VALUE</b>
Flue Cured	44,174	479,565	49,669	536,354	48,409	569,469
Burley	16,998	200,118	18,758	238,469	18,465	275,884
Dark Air	2,533	25,099	2,831	38,484	3,393	40,854
Oriental	13,496	141,426	13,603	143,185	9,726	104,576
<b>Grand Total</b>	<b>77,201</b>	<b>846,208</b>	<b>84,861</b>	<b>956,492</b>	<b>79,993</b>	<b>990,783</b>

<b>Exports</b>	<b>VOLUME</b>	<b>VALUE</b>	<b>VOLUME</b>	<b>VALUE</b>	<b>VOLUME</b>	<b>VALUE</b>
Flue Cured	6,345	99,770	8,652	138,808	10,996	157,795
Burley	745	6,312	1,253	9,758	1,268	10,108
Dark Air	1,512	14,418	1,759	16,233	2,416	18,901
Oriental	1,231	14,837	832	10,555	553	8,080
<b>Grand Total</b>	<b>9,833</b>	<b>135,337</b>	<b>12,496</b>	<b>175,354</b>	<b>15,233</b>	<b>195,034</b>

Source: Central Bureau for Statistics, 2001



An increase in cigarette production in the Netherlands will likely result in increased imports of U.S. flue-cured tobacco. However, for burley tobacco, imports from the United States will be driven by the "just in time" buying policy of the cigarette manufacturers. The companies will continue to allow the leaf dealers to hold the tobacco in their U.S. inventories until it is absolutely necessary. Because of the EU's 1993 legislation for maximum levels of tar/nicotine (effective in 1998), there may be a minor shift to imports of lighter tobacco from the United States for the production of "light" cigarettes and "light" roll-your-own tobacco.

## Prices

The price of one pack of 25 cigarettes:

Prices of Cigarettes (25)		
Date:	Dutch Guilder	US\$1.00 = DFL
July 1, 1992	5.10	1.76
January 1, 1993	5.50	1.86
October 1, 1994	5.65	1.70
October 1, 1995	5.75	1.60
April 1, 1997	6.15	1.90
April 1, 1998	6.45	2.07
January 1, 1999	6.70	1.88
March 1, 2000	6.95	2.28
January 1, 2001	7.55	3.16

Source: Association of the Cigarette Industry, 2001

The EU excise tax on cigarettes was "harmonized" in 1993 to a minimum of 57 percent of the retail price. The Netherlands implemented the EU excise tax directive in that same year. However, as different EU countries have different retail prices, excise taxes are, in reality, far from harmonized. This is especially the case in northern EU countries which have higher cigarette prices than the southern "monopoly" countries. For instance, cigarette prices in Denmark are five times higher than in Spain. Southern European countries do not want to increase their prices as they fear competition by the more popular cigarettes (mostly American blends) from the northern EU countries, and the northern countries fear the influx of the less expensive southern EU cigarettes.

The Dutch market for cigarettes is fairly stable. However, increased prices have a local impact, as more smokers buy their cigarettes in Germany or Belgium where prices are cheaper. In addition, higher prices - due to a higher excise tax - boost black market sales.

<b>Prices of Cigarettes as of January 1, 2001</b> (Prices for 25 Piece Pack)		
	<b>Guilders</b>	<b>Percent</b>
Retail price	7.55	100.0
of which:		
Excise tax	4.30	57.0
Value-added Tax	1.21	16.0
Cost and margins	2.04	27.0

Source: Association of the Cigarette Industry, 2001

## Distribution

<b>Type of outlet - Cigarettes</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>
Tobacco specialty shops	20.1%	21.0%	19.3%
Supermarkets	30.5%	31.4%	33.7%
Petrol stations	14.0%	14.0%	12.3%
Restaurants & café's	21.0%	20.4%	20.8%
Other	14.4%	13.2%	13.9%

Source: Association of the Cigarette Industry, 2001

In 1999, Dutch supermarkets strengthened their position as the main retail outlet for cigarettes. Their cigarette sales totaled US \$965 million, which was slightly more than one third of all cigarette sales in the Netherlands. Total sales statistic for cigarettes for the year 2000 are not yet available.

## Quality, Safety and Health Regulations

Health warnings, along with tar and nicotine levels, are required on cigarette packages. Dutch anti-smoking regulations require health warnings to cover 15 percent of billboards and posters and warnings in print media must cover 10 percent. No advertising on billboards is allowed, except on the two Dutch racetracks. Television advertising is also prohibited. Advertisements cannot link smoking with sports, youth, or health care and people younger than 25 are not allowed to appear in ads. Free sampling of cigarettes is banned. No advertising is permitted in the neighborhoods of health care centers and schools. Cigarette advertising in cinemas was banned in January 1996. Restrictions on smoking in specific public places are currently in effect.

A smoking ban exists for government-subsidized cultural institutes and more stringent regulations are planned for cigarette advertising. These plans have sparked angry reactions from the tobacco industry which claims that more and more restrictions are being imposed every year.

In June 2000, political agreement has been reached in the European Council and the European Parliament on a proposal for a EU directive to harmonize the manufacture, presentation, and sales of tobacco products. The proposal is based on a report which the EU Commissioner for Health presented in 1996, discussing final and regulatory channels for combating tobacco-related health risks. As 500,000 EU citizens die each year of smoking-related diseases, the EU has begun to focus on the protection of public health through the prevention of smoking. The political agreement opens the door for an early adoption of the following elements:

- , a reduction in maximum tar levels of cigarettes from 12 mg to 10 mg per cigarette beginning December 31, 2003, or three years from the date of adoption;
- , the creation of a maximum nicotine yield level of cigarettes marketed or manufactured in the EU of 1 mg per cigarette beginning December 31, 2003, or three years from the date of adoption;
- , the creation of a maximum carbon monoxide yield of not more than 10 mg per cigarette beginning December 31, 2003, or three years from the date of adoption;
- , the obligation for all manufacturers and importers of tobacco products to submit a list of non-tobacco ingredients, including additives, used in the manufacture of their tobacco products by brand;
- , bigger and clearer warnings ("smoking kills") covering 25 percent of the package on tobacco products. The attention of consumers will be drawn to the links between smoking and certain diseases, and the particular danger of tobacco use by pregnant women;
- , the prohibition of terms such as "low tar," "light," "mild." These terms have in the past led to misunderstandings on the part of consumers, who mistakenly assumed that these terms indicate that the products were less harmful to human health.

In spring 2001, the Dutch minister of Public Health, Social Welfare and Sport proposed an amendment of the 1998 Dutch tobacco directive in line with the new EU directive. New legislation on minimum selling age, advertising & sponsoring, vending machines, smoking restrictions, and excise tax should further reduce the death toll from tobacco related illnesses. In the Netherlands, more than 24,000 people die each year of smoking. About 50 percent are under the age of sixty. In addition, approximately 3,000 non-smokers die of passive smoking. Smokers are more often sick than non-smokers. In the Netherlands, the annual loss in production due to smokers on sick leave is US \$754 million. The Dutch parliament will vote on the draft tobacco directive next autumn.

### **Claims Against the Dutch Tobacco Industry**

Since spring 2000, the Dutch tobacco industry has faced several claims from hundreds of smokers who suffer from smoking-related diseases. The Dutch Smokers Fund, who represents these smokers, holds the Dutch tobacco industry and the government responsible for the bad health of its clients. According to the Smokers Fund, the tobacco industry and the government did not warn people against the risks of smoking, even they have known the risks since the 1950's. The juridical procedure could last 10-15 years, but it is expected that millions of U.S. dollars could be paid in claims. In addition, individual smokers have brought suits against the Dutch tobacco companies Koninklijke Theodorus Niemeyer B.V. and Philip Morris.

**PSD & Trade Matrices**

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	0	0	0	0	0	0
Beginning Stocks	28,364	28,364	18,337	18,337	6,440	7,542
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	27,401	27,401	30,963	29,606	0	31,797
Other Foreign Imports	57,459	57,459	54,011	50,387	0	44,189
TOTAL Imports	84,860	84,860	84,974	79,993	0	75,986
TOTAL SUPPLY	113,224	113,224	103,311	98,330	6,440	83,528
Exports	12,497	12,497	14,746	13,412	0	14,324
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	25,990	25,990	29,109	27,913	0	23,467
Other Foreign Consump.	56,400	56,400	53,016	49,463	0	43,379
TOTAL Dom. Consumption	82,390	82,390	82,125	77,376	0	66,846
TOTAL Disappearance	94,887	94,887	96,871	90,788	0	81,170
Ending Stocks	18,337	18,337	6,440	7,542	0	2,358
TOTAL DISTRIBUTION	113,224	113,224	103,311	98,330	0	83,528

Note: Total Distribution is lower in 1999 due to the reduction of commodities from the Gain Reporting Review

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Total		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>1999</b>		<b>2000</b>
U.S.	27,401	U.S.	29,606
Others		Others	
E.U.	13,483	E.U.	14,131
-Belgium	158	-Belgium	1,424
-Germany	6,457	-Germany	4,692
-Greece	2,717	-Greece	413
Zimbabwe	10,735	Zimbabwe	4,031
Brazil	8,832	Brazil	13,995
Turkey	8,106	Turkey	5,656
Malawi	2,917	Malawi	1,296
India	2,231	India	2,907
Total for Others	46,304		42,016
Others not Listed	11,155		8,371
Grand Total	84,860		79,993

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Total		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>1999</b>		<b>2000</b>
U.S.		U.S.	30
Others		Others	
E.U.	12,394	E.U.	11,121
-Belgium/Lux	5,407	-Belgium/Lux	3,881
-Ireland	1,182	-Ireland	759
-Greece	3,714	-Greece	3,707
India	-	India	877
Zimbabwe	-	Zimbabwe	599
Brazil	-	Brazil	1,660
Total for Others	12,394		14,257
Others not Listed	103		946
Grand Total	12,497		15,233

PSD Table						
Country	Netherlands					
Commodity	Tobacco,Unmfg.,Flue Cured				(HA)(MT)	
	<b>Revised</b>	<b>1999</b>	<b>Preliminary</b>	<b>2000</b>	<b>Forecast</b>	<b>2001</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
Market Year Begin		<b>01/1999</b>		<b>01/2000</b>		<b>01/2001</b>
Area Planted	0	0	0	0	0	0
Beginning Stocks	239	239	255	255	245	250
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	17,630	17,630	20,627	19,517	0	21,410
Other Foreign Imports	32,039	32,039	34,602	28,892	0	26,061
TOTAL Imports	49,669	49,669	55,229	48,409	0	47,471
<b>TOTAL SUPPLY</b>	<b>49,908</b>	<b>49,908</b>	<b>55,484</b>	<b>48,664</b>	<b>245</b>	<b>47,721</b>
Exports	8,653	8,653	10,989	10,996	0	13,338
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	12,000	12,000	13,500	14,967	0	15,360
Other Foreign Consump.	29,000	29,000	30,750	22,451	0	18,773
TOTAL Dom. Consumption	41,000	41,000	44,250	37,418	0	34,133
TOTAL Disappearance	49,653	49,653	55,239	48,414	0	47,471
Ending Stocks	255	255	245	250	0	250
<b>TOTAL DISTRIBUTION</b>	<b>49,908</b>	<b>49,908</b>	<b>55,484</b>	<b>48,664</b>	<b>0</b>	<b>47,721</b>

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>1999</b>		<b>2000</b>
U.S.	17,630	U.S.	19,517
Others		Others	
E.U.	5,332	E.U.	6,353
-Germany	3,096	-Germany	4,281
Zimbabwe	10,735	Zimbabwe	3,991
Brazil	7,009	Brazil	11,408
Malawi	1,799	Malawi	713
India	1,780	India	2,516
Tanzania	2,764	Tanzania	747
		China	1,066
		Thailand	410
Total for Others	29,419		27,204
Others not Listed	2,620		1,688
Grand Total	49,669		48,409

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>1999</b>		<b>2000</b>
U.S.		U.S.	20
Others		Others	
E.U.	8,652	E.U.	7,874
-Belgium/Lux	2,538	-Belgium	1,709
-Ireland	1,182	-Ireland	759
-Italy	844	-Italy	990
-Greece	3,714	-Greece	3,707
-Portugal	364	-Portugal	168
		Brazil	1,660
		Zimbabwe	598
		Tanzania	213
		India	382
Total for Others	8,652		10,727
Others not Listed	1		249
Grand Total	8,653		10,996

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	<b>Revised</b>	<b>1999</b>	<b>Preliminary</b>	<b>2000</b>	<b>Forecast</b>	<b>2001</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
Market Year Begin		<b>01/1999</b>		<b>01/2000</b>		<b>01/2001</b>
Area Planted	0	0	0	0	0	0
Beginning Stocks	4,000	4,000	3,542	3,542	3,039	3,257
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	9,758	9,758	11,612	10,089	0	10,422
Other Foreign Imports	9,000	9,000	8,910	8,376	0	7,798
TOTAL Imports	18,758	18,758	20,522	18,465	0	18,220
<b>TOTAL SUPPLY</b>	<b>22,758</b>	<b>22,758</b>	<b>24,064</b>	<b>22,007</b>	<b>3,039</b>	<b>21,477</b>
Exports	1,253	1,253	1,767	1,268	0	1,283
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	7,438	7,438	8,628	7,683	0	7,929
Other Foreign Consump.	10,525	10,525	10,630	9,799	0	9,123
TOTAL Dom. Consumption	17,963	17,963	19,258	17,482	0	17,052
TOTAL Disappearance	19,216	19,216	21,025	18,750	0	18,335
Ending Stocks	3,542	3,542	3,039	3,257	0	3,142
<b>TOTAL DISTRIBUTION</b>	<b>22,758</b>	<b>22,758</b>	<b>24,064</b>	<b>22,007</b>	<b>0</b>	<b>21,477</b>



<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Burley		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>1999</b>		<b>2000</b>
U.S.	9,758	U.S.	10,089
Others		Others	
E.U.	3,797	E.U.	4,036
-Belgium/Lux	105	-Belgium/Lux	71
-Germany	2,410	-Germany	2,996
-Italy	715	-Italy	634
Brazil	1,429	Brazil	2,182
Malawi	1,118	Malawi	373
Uganda	1,325	Uganda	328
Argentina	729	Argentina	906
Total for Others	8,398		7,825
Others not Listed	602		551
Grand Total	18,758		18,465

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Burley		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>1999</b>		<b>2000</b>
U.S.		U.S.	
Others		Others	
E.U.	1,204	E.U.	937
-Belgium	642	-Belgium	144
-Germany	557	-Germany	579
Hungary	15	Hungary	14
		Malawi	290
Total for Others	1,219		1,241
Others not Listed	34		27
Grand Total	1,253		1268

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	<b>Revised</b>	<b>1999</b>	<b>Preliminary</b>	<b>2000</b>	<b>Forecast</b>	<b>2001</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
Market Year Begin		<b>01/1999</b>		<b>01/2000</b>		<b>01/2001</b>
Area Planted	0	0	0	0	0	0
Beginning Stocks	7,484	7,484	5,105	5,105	2,976	3,446
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	13,603	13,603	13,739	9,726	0	6,954
TOTAL Imports	13,603	13,603	13,739	9,726	0	6,954
<b>TOTAL SUPPLY</b>	<b>21,087</b>	<b>21,087</b>	<b>18,844</b>	<b>14,831</b>	<b>2,976</b>	<b>10,400</b>
Exports	832	832	566	553	0	368
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	15,150	15,150	15,302	10,832	0	7,745
TOTAL Dom. Consumption	15,150	15,150	15,302	10,832	0	7,745
TOTAL Disappearance	15,982	15,982	15,868	11,385	0	8,113
Ending Stocks	5,105	5,105	2,976	3,446	0	2,287
<b>TOTAL DISTRIBUTION</b>	<b>21,087</b>	<b>21,087</b>	<b>18,844</b>	<b>14,831</b>	<b>0</b>	<b>10,400</b>

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Oriental		
Time period	CY	Units:	Metric Tons
<b>Imports for:</b>	<b>1999</b>		<b>2000</b>
U.S.		U.S.	
Others		Others	
E.U.	4,066	E.U.	2,611
-France	267	-France	171
-Germany	951	-Germany	1,703
-Greece	2,717	-Greece	413
Turkey	8,106	Turkey	5,636
Bulgaria	657	Bulgaria	725
		Albania	260
		Malawi	208
Total for Others	12,829		9,440
Others not Listed	774		286
Grand Total	13,603		9,726

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Oriental		
Time period	CY	Units:	Metric Tons
<b>Exports for:</b>	<b>1999</b>		<b>2000</b>
U.S.		U.S.	
Others		Others	
E.U.	816	E.U.	540
-Belgium	539	-Belgium	372
-Italy	173	-Italy	163
Russia	10	-U.K.	2
Hungary	5	Kazakhstan	4
Total for Others	831		544
Others not Listed	1		9
Grand Total	832		553

PSD Table						
Country	Netherlands					
Commodity	Unmfg.,Dark Air & Sun Cured				(HA)(MT)	
	<b>Revised</b>	<b>1999</b>	<b>Preliminary</b>	<b>2000</b>	<b>Forecast</b>	<b>2001</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
Market Year Begin		<b>01/1999</b>		<b>01/2000</b>		<b>01/2001</b>
Area Planted	0	0	0	0	0	0
Beginning Stocks	4,433	4,433	4,389	4,389	4,336	4,066
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	13	13	4	0	0	0
Other Foreign Imports	2,818	2,818	3,171	3,393	0	3,966
TOTAL Imports	2,831	2,831	3,175	3,393	0	3,966
<b>TOTAL SUPPLY</b>	<b>7,264</b>	<b>7,264</b>	<b>7,564</b>	<b>7,782</b>	<b>4,336</b>	<b>8,032</b>
Exports	1,759	1,759	2,005	2,416	0	3,073
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	6	6	2	2	0	0
Other Foreign Consump.	1,110	1,110	1,221	1,298	0	1,517
TOTAL Dom. Consumption	1,116	1,116	1,223	1,300	0	1,517
TOTAL Disappearance	2,875	2,875	3,228	3,716	0	4,590
Ending Stocks	4,389	4,389	4,336	4,066	0	3,442
<b>TOTAL DISTRIBUTION</b>	<b>7,264</b>	<b>7,264</b>	<b>7,564</b>	<b>7,782</b>	<b>0</b>	<b>8,032</b>

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	<b>Revised</b>	<b>1999</b>	<b>Preliminary</b>	<b>2000</b>	<b>Forecast</b>	<b>2001</b>
	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>	<b>Old</b>	<b>New</b>
Market Year Begin		<b>01/1999</b>		<b>01/2000</b>		<b>01/2001</b>
Filter Production	103,185	103,185	106,281	105,841	0	108,487
Non-Filter Production	16,798	16,798	17,301	14,818	0	15,188
TOTAL Production	119,983	119,983	123,582	120,659	0	123,675
Imports	15,833	15,833	14,250	14,725	0	13,694
<b>TOTAL SUPPLY</b>	<b>135,816</b>	<b>135,816</b>	<b>137,832</b>	<b>135,384</b>	<b>0</b>	<b>137,369</b>
Exports	105,113	105,113	106,164	101,550	0	102,897
Domestic Consumption	30,703	30,703	31,668	33,834	0	34,472
<b>TOTAL DISTRIBUTION</b>	<b>135,816</b>	<b>135,816</b>	<b>137,832</b>	<b>135,384</b>	<b>0</b>	<b>137,369</b>

*Note: The PS&D consumption figure is the residual of production plus imports minus exports. However, the Dutch Cigarette Manufacturers Association uses tax seal figures to compute "true" consumption figures and makes adjustments for the so-called anticipation purchases and border sales. Anticipation purchases occur when a price increase is announced. Border sales are purchases of cigarettes in the Netherlands by visiting Germans or Belgians who come to the Netherlands to buy Dutch cigarettes, which are less expensive than those sold in their own country.*

<b>Import Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Million Pieces
<b>Imports for:</b>	<b>1999</b>		<b>2000</b>
U.S.	1	U.S.	
Others		Others	
E.U.	15,823	E.U.	14,482
-France	310	-France	220
-Belgium	4,330	-Belgium	4,307
-Germany	3,982	-Germany	3,397
-U.K.	6,145	-U.K.	5,730
South Africa	5	South Africa	0
Poland	-	Poland	195
Switzerland	1	Switzerland	36
Total for Others	15,829		14,713
Others not Listed	3		12
Grand Total	15,833		14,725

<b>Export Trade Matrix</b>			
Country	Netherlands		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Million Pieces
Exports for:	1999		2000
U.S.	49	U.S.	94
Others		Others	
E.U.	101,320	E.U.	98,609
-France	37,512	-France	39,525
-Belgium/Lux	7,820	-Belgium	6,188
-Germany	10,264	-Germany	6,699
-Italy	33,496	-Italy	36,506
-Greece	4,400	-Greece	3,653
Switzerland	391	Switzerland	130
Slovenia	253	Slovenia	105
Japan	1,030	Japan	802
Total for Others	102,994		99,646
Others not Listed	2,070		1,810
Grand Total	105,113		101,550